# UNITED STATES HOUSE OF REPRESENTATIVES ETHICS IN GOVERNMENT ACT

# 2014 FINANCIAL DISCLOSURE STATEMENT - FORM A

Please provide the following information. Your address and signature <u>WILL NOT</u> be made available to the public.

Hon. Sander M. Levi	n 202-225-4961 (Daytime Telephone)	
1236 Longworth HOB	, Washington, DC 20515	
(Complete A	ddress – Office or Home)	
Filer Status: X Me	ember Officer or Employee	
CERTIFICATION - THIS DOCUMENT MUST BE	SIGNED BY THE REPORTING INDIVIDUAL	AND DATED
The attached Financial Disclosure Statement is required by the		
available to any requesting person upon written application and w		
who knowingly and willfully falsifies, or who knowingly and will		to civil penalties and
criminal sanctions. See section 104 of the Ethics in Government Ac	et (5 U.S.C. app. 4 §§ 101-111) and 18 U.S.C. § 1001.	
	61 4 6D 41 1 1 1	D /
Certification L. CERTIFICATION	Signature of Reporting Individual	Date
I CERTIFY that the statements I have made on the attached financial disclosure statement and all attached schedules are true,		05/15/2015
complete, and correct to the best of my knowledge and belief.	Janky Jerry	

Members must file a signed original and two photocopies thereof.

Officers and Employees must file a signed original and one photocopy thereof.

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

#### FILER INFORMATION

Name: Hon. Sander M. Levin

Status: Member State/District: MI09

#### FILING INFORMATION

Filing Type: Annual Report

Filing Year: 2014

**Filing Date:** 05/15/2015

# SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
1/2 interest in 78 acres		\$142,400	None		
LOCATION: Tyrone Township, Livingston County, MI, US					
1/6 interest in 18 acres		\$12,766	None		
LOCATION: Tyrone Township, Livingston County, MI, US					
1/9 undivided interest in LevinsonLevin Properties, L.L.C., commercial real estate, West Maple		\$124,162	Rent	\$5,001 \$15,000	
LOCATION: Birmingham, MI, US				φ15,000	
1/9 undivided interest in LevinsonLevin Properties, L.L.C., commercial real estate, West Maple		\$66,647	Rent	\$5,001 \$15,000	
LOCATION: Birmingham, MI, US				Ţ- <b>0</b> ,	
5.3% interest in Michigan mineral rights previously held by LNS Co., a general partnership now liqui		\$15,001 \$50,000	Royalties	\$8,279.17	
DESCRIPTION: Muskegon Development Co., an assignee from prev Energy Co. income \$3,254.84; Linn Operating Inc., income \$5 on latest available information and technical advice.		_	_		
Apple Bank for Savings	SP	\$43,271.19	Interest	\$43.94	
Congressional Federal Credit Union		\$17,335	None		
House, Lot 4, West Tisbury, Mass. (subject to Quicken Loan Mortgage)		\$1,171,300	Rent	\$22,150	
Location: West Tisbury, MA, US					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
$IRA \Rightarrow$ First National Bank Certificate of Deposit	SP	\$13,914.93	TaxDeferred		
$\begin{array}{l} \text{IRA} \Rightarrow \\ \text{First National Bank Certificate of Deposit} \end{array}$	SP	\$7,883.15	${\bf TaxDeferred}_{\square}$		
$\begin{array}{l} {\rm IRA} \Rightarrow \\ {\rm Security~Benefit:~Variflex~Qualified~Variable~Annuity} \end{array}$	SP	\$45,540	$\mathbf{TaxDeferred}_{\square}$		П
$\begin{array}{l} {\rm IRA} \Rightarrow \\ {\rm Univ.\ of\ Houston\ Texas\ Optional\ Retirement\ Program:} \\ {\rm TIAA\ Traditional} \end{array}$	SP	\$116,296.72	TaxDeferred		
Merrill Lynch The Victoria S. Levin Special Legacy Trust ⇒ American Bond Fund of America CL C		\$93,871.68	Dividends	\$820.69	<b>▽</b>
Merrill Lynch The Victoria S. Levin Special Legacy Trust  ⇒ American Capital Income Builders CL C		\$113,237.37	Capital Gains, Dividends	\$7,966.96	<u>~</u>
Merrill Lynch The Victoria S. Levin Special Legacy Trust  ⇒ American Income Fund of America CL C		\$122,640.98	Capital Gains, Dividends	\$8,246.62	V
Merrill Lynch IRA $\Rightarrow$ American Bond Fund of America CL C		\$1,498.77	${\bf TaxDeferred}_{\square}$		
Merrill Lynch IRA ⇒ American Capital Income Builder CL C		\$20,274.2	$\mathbf{TaxDeferred}_{\square}$		
Merrill Lynch IRA ⇒ American Capital Income Builder CL F1		\$18,770.85	${\bf TaxDeferred}_{\bot}$		
Merrill Lynch IRA $\Rightarrow$ American Income Fund of America CL C		\$54,801.12	$\mathbf{TaxDeferred}_{\square}$		
Penn State Federal Credit Union	SP	\$71,864.7	Interest	\$14.09	
Penn State University Alternate Retirement Plan $\Rightarrow$ CREF Global Equities	SP	\$176,103.05	$\mathbf{TaxDeferred}_{\square}$		П
Penn State University Alternate Retirement Plan ⇒ CREF Social Choice	SP	\$184,123.85	$\mathbf{TaxDeferred}_{\square}$		
Penn State University Alternate Retirement Plan ⇒ TIAA Traditional	SP	\$208,272.83	$\mathbf{TaxDeferred}_{\square}$		
Penn State University Tax Deferred Annuity Plan ⇒ CREF Global Equities	SP	\$99,516.23	$\mathbf{TaxDeferred}_{\square}$		
Penn State University Tax Deferred Annuity Plan ⇒ CREF Growth	SP	\$45,474.26	TaxDeferred		

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Penn State University Tax Deferred Annuity Plan ⇒ CREF Social Choice	SP	\$308.93	TaxDeferred		П
Penn State University Tax Deferred Annuity Plan ⇒ TIAA Traditional	SP	\$49,352.75	TaxDeferred		
Wells Fargo Bank		\$791.51	None		П

<sup>\*</sup> Asset class details available at the bottom of this form.

# SCHEDULE B: TRANSACTIONS

Asset	Owner Date	Tx. Type	Amount	Cap. Gains > \$200?
Merrill Lynch The Victoria S. Levin Special Legacy Trust  ⇒ American Bond Fund of America CL C	06/10/2014	S (partial)	\$4,996.15	<b>~</b>
Merrill Lynch The Victoria S. Levin Special Legacy Trust  ⇒ American Bond Fund of America CL C	10/6/2014	S (partial)	\$13,333.43	<b>~</b>
Merrill Lynch The Victoria S. Levin Special Legacy Trust  ⇒ American Capital Income Builder Cl C	01/13/2014	S (partial)	\$4,995.55	<u>~</u>
Merrill Lynch The Victoria S. Levin Special Legacy Trust  ⇒ American Capital Income Builder CL C	06/10/2014	S (partial)	<b>\$4,960.8</b>	<u>~</u>
Merrill Lynch The Victoria S. Levin Special Legacy Trust  ⇒ American Capital Income Builder CL LC	10/6/2014	S (partial)	\$13,306.98	<b>▽</b>
Merrill Lynch The Victoria S. Levin Special Legacy Trust  ⇒ American Income Fund of America CL C	01/13/2014	S (partial)	\$5,003.21	~
Merrill Lynch The Victoria S. Levin Special Legacy Trust  ⇒ American Income Fund of America CL C	06/10/2014	S (partial)	\$4,994.25	<u>~</u>
Merrill Lynch The Victoria S. Levin Special Legacy Trust  ⇒ American Income Fund of America CL C	10/6/2014	S (partial)	\$13,327.68	<b>V</b>

<sup>\*</sup> Asset class details available at the bottom of this form.

### SCHEDULE C: EARNED INCOME

Source	Type	Amount
Penn State University	Spouse Salary	N/A
Emory University	Spouse Speech	\$500
University of MassachusettsAmherst	Spouse Speech	\$1,000
Wayne State University	Spouse Speech	\$400
National Institutes of Health	Scientific Reviewer	\$755

#### SCHEDULE D: LIABILITIES

Ov	vner Creditor	Date Incurred Type		Amount of Liability
	Quicken Loans	September 2012	Mortgage, West Tisbury, Massachusetts	\$398,876.98

#### **S**CHEDULE **E**: **P**OSITIONS

Position	Name of Organization
Member	LevinsonLevin Properties, L.L.C.

#### SCHEDULE F: AGREEMENTS

None disclosed.

#### SCHEDULE G: GIFTS

None disclosed.

#### SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details			-	Inclusions			
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Aspen Institute Congressional Program	02/15/2014	02/23/2014	Washington, DC Bogota, Colombia Washington, DC	3	<u> </u>		<b>▽</b>

#### SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

#### SCHEDULE A AND B ASSET CLASS DETAILS

- IRA (Owner: SP)
- o Merrill Lynch The Victoria S. Levin Special Legacy Trust
- o Merrill Lynch IRA
- Penn State University Alternate Retirement Plan (Owner: SP)
- Penn State University Tax Deferred Annuity Plan (Owner: SP)

#### EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?  $\bigcirc$  Yes  $\bigcirc$  No

**Trusts**: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

Cyes CNo

**Exemption**: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

Cyes CNo

#### **COMMENTS**

#### **CERTIFICATION AND SIGNATURE**

I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Sander M. Levin, 05/15/2015